PURPOSE: To establish and document the policy and procedure dealing with the in-scope IT fixed assets of agencies transitioned to VITA.

SCOPE: In-scope information technology (IT) goods and services ordered by agencies transitioned to VITA.   A list of in-scope IT goods required to be tagged can be found in Item 10, below. A complete list of in-scope goods and services is available on VITA's website.

STATEMENT OF
POLICY: As part of the transition of information technology (IT) assets to Virginia Information Technologies Agency (VITA), agencies have provided VITA with basic IT assets inventory information via updates to the Physical IT Asset Inventory System. Inventory Identification and Tagging (IIT) completes the transfer of agency IT assets to VITA.

Failure to follow these procedures may result in adverse impacts on transformation rate-setting, agency savings calculations and retention, help desk responses, negotiation of future supplier contracts, and billings after transformation based on location and type of asset.

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Service Level Directors (SLD) or their designees are responsible for:

- Placement of VITA asset inventory tags on in-scope Information Technology fixed assets (listed in item 10) transitioned to VITA. Existing agency tags need not be removed.

- Verification and/or update of the Physical IT Asset Inventory System based on findings during the inventory tagging.

- Ongoing update of the Physical IT Asset Inventory System including the recording of additions, moves, changes, and disposals of equipment

- Submission of the inventory certification (item 12) to the VITA Controller.

NOTE:

Asset tagging and Physical IT Asset Inventory updates must be completed and certification (item 12) submitted to the VITA Controller **no later than May 10, 2005 and** no less than biennially thereafter. Earlier completion of the tagging and inventory update is strongly recommended.

Service Level Directors (SLD) or their designees must keep in mind that:

Equipment purchased through the Master Equipment Leasing Program MELP as well as other leased equipment should be tagged.

Seat Managed assets should not be tagged but must be listed on the inventory for planning purposes. If available, the vendor tag number should be included in the asset inventory. Put a "Y" in the seat managed column and mark "private" in the Owner field of the Asset Inventory.

Employees may have VITA owned equipment in their possession. This equipment must be tagged and verified to the inventory. SLD's may send a tag with the employee and have the employee validate the information for equipment in their possession if it is not feasible for the employee to bring the equipment to the customer location for tagging. Customer agencies may have had existing procedures for tracking these assets. The SLD may want to adopt these procedures in lieu of developing new ones.

Assets that are ordered through VITA should be tagged and all identifying information entered into the Physical IT Asset Inventory System. Information must include:

Manufacturer
Model and Model Number
Serial number
Inventory tag number
Custodian (employee, supervisor or work unit where the asset is assigned)
Location: Building/Floor/Room (where available)

ASSOCIATED
PROCEDURE: *On-Site Review* refers to collection and recording of all available information, for each VITA IT asset. This activity includes all identifying information provided by the manufacturer of the equipment (e.g., nomenclature, model name, model number, serial number, physical location, etc.), as well as identifying information provided by seat management (e.g., ID tags), agency (e.g., ID tags), and other sources.

Service Level Directors (SLD) or their designees should:

1. Contact the AITR to schedule mutually agreeable dates and times to conduct an IIT project at the agency. Resolve IIT-related issues between the agency and VITA, access and security, and parking.

2. Have agency provide main contact and alternate contact information, for the main office and any branch offices.
   a. Contact Name
   b. Address
   c. Phone number
   d. Room number
   e. Work hours
   f. Other contact information

3. Contact VITA Financial Management Services
   Paul Staton, Associate Director for Customer Services or his designee
   paul.staton@vita.virginia.gov
   (804) 371-5599
   to obtain a block of tags to be used for tagging equipment.

4. Print a hardcopy of the most up-to-date asset inventory information from the Physical IT Asset Inventory System.

- If serial number IS visible on the equipment, verify existing serial number information on the hardcopy spreadsheet or record new serial number information.

- If serial number IS NOT visible on the equipment, leave existing serial number information on the hardcopy spreadsheet unchanged.

5. Enter the VITA asset tag number into the hardcopy spreadsheet.

> If the asset already has a VITA asset tag, validate the number associated information. Note the data validation on the worksheet in the "Comments" section.

6. Apply VITA asset tag to equipment. Tags should be placed near or on the front of each unit, should be easily viewed without moving unit, and should NOT cover functional parts of unit (indicator lights, buttons, cover access screws, etc.). Use photos 1-5 at end of this procedure as examples of where tags should be placed.

7. Verify and/or enter as much of the following information as is available on the hardcopy spreadsheet:
    a. Agency Number
    b. District
    c. Building Name
    d. Location, if applicable
    e. Suite, if applicable
    f. Floor, if applicable
    g. Room, if applicable
    h. Street
    i. City
    j. Zip Code
    k. Serial Number
    l. Equipment Type
    m. Manufacturer
    n. Model Number
    o. VITA Tag Number
    p. Agency Tag Number
    q. Supplier / Other Tag Number, if applicable
    r. Status (In service, Out of service)

- For any assets not on hardcopy spreadsheet, record as much of the above asset information as possible, including VITA asset tag number.
- If duplicate assets are identified, mark one of the duplicates as "Out of service" in the Asset Inventory system and note in the "Comments" section that it was a duplicate listing.

8. Update the Physical IT Asset Inventory System information from hardcopy spreadsheets and resolve any discrepancies. It is recommended that this be done periodically throughout the inventory rather than all at once at the conclusion.

9. Retain unused tags for receipt of new assets.

10. At a minimum, tag and update the Asset Inventory for the following:

Cabinets/racks
Data Center printers
Desktop printers
Firewalls
Hubs
ISDN Rack-mounted NT1s
Key systems
Network printers
Network scanners
PBXs
PCs – desktop (includes CPU, keyboard, speakers, mouse)
PCs – monitors (recommended by Strategic Management Services for platform architecture purposes because a monitor's replacement life cycle is two to three times as long as that of the computer, but the monitor is usually replaced when the computer is replaced) – enter in the Asset Inventory System as "peripheral" equipment type
PCs – portables, including notebooks, laptops, pen tablets
PCs – docking stations) – enter in the Asset Inventory System as "peripheral" equipment type
Polycom™ or similar video conferencing equipment
Power supply/UPS not connected to desktop unit
Racks/cabinets
Routers
Servers
Switches
Video bridges
Video gatekeepers
Video gateways
VOIP gateways
VOIP switches
Wireless access points (WAP)

Please remember to **include maintenance and warranty information** when updating the Asset Inventory system. See the Physical Asset Inventory User Guide for more information.

11. Assets must be removed from DOA's Fixed Asset Accounting & Control System (FAACS) in accordance with FAACS Transfer Instructions found at http://www.vita.virginia.gov/extranet/.

12. CERTIFICATION:

I certify that:

- o as of (date) a physical inventory has been performed at the (agency name, number) in accordance with these policies and procedures,
- o inventory tags have been affixed at a minimum to all equipment identified in item 10,
- o the VITA Physical Asset Inventory System has been updated to reflect inventory findings (adds, deletes, moves, changes), and
- o the customer agency Chief Fiscal Officer or designee has been advised of the assets included in VITA's inventory and provided a copy of the DOA guidance for removing assets from FAACS.

NAME
DATE

(This certification may be e-mailed to the VITA Controller.)

13. Suggested placement of inventory tags.

Photo 1: Location of Tag on Notebook and Laptop Computers

Photo 2: Location of Tag on Desktop PCs.

Photo 3: Location of Tags on Servers Mounted in Racks

(Notice that lower server tag has been rotated, to fit on front of server. When turned, tag should be placed so that it is oriented the same as server labels.)

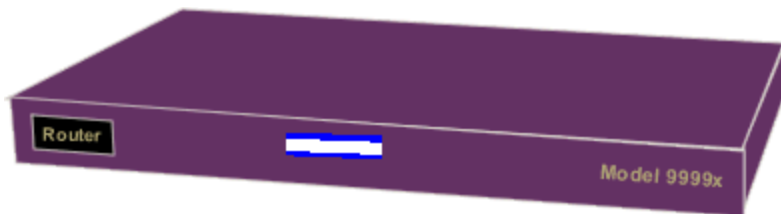Photo 4: Location of Tag on Network Printers.

Photo 5: Location of Tag on Routers.

ASSOCIATED POLICIES AND PROCEDURES:
- Procurement of IT Goods and Services by Agencies transitioned to VITA
- eVA Requisitioning and Receiving Procedures
- Receipt of IT Goods & Services by Agencies Transitioned to VITA
- Revenues & Billing Policy
- http://www.vita.virginia.gov/integration/latt/lattWorkbook.cfm Go to Finance; choose PhysicalITAssetInventorySystemIntroductionv1.0.pdf
- Asset Relocation and Surplus Property Procedure

AUTHORITY
REFERENCE: Code of Virginia §2.2-2005 through §2.2-2013